



**PROPOSAL REQUEST
INFORMAL SOLICITATION # 1116560
CEX STRATEGIC PLANS PUBLIC OUTREACH**

Montgomery County, Maryland

Office of the County Executive

May 13, 2020

ISSUE DATE: May 13, 2020

SUBMISSION DEADLINE: May 29, 2020 at 6PM

SCOPE OF WORK SUMMARY: The selected contractor will assist the Montgomery County Office of the County Executive (CEX) in facilitating outreach and engagement with traditionally underrepresented demographic groups and neighborhoods as CEX partakes on two strategic plans for addressing climate change (the [Climate Action and Resiliency Plan](#)) and traffic safety ([Vision Zero Ten-Year Strategy](#)). The following pages contain the scope of work, terms, and conditions for this Solicitation.

The County anticipates the estimated contract value to be above ten thousand dollars (\$10,000) and below twenty thousand dollars (\$20,000). The total contract value cannot exceed the Informal threshold (below \$100,000), including any potential renewal years. Payment will be based on the negotiated fully-burdened hourly rate approved under the resulting contract.

NOTE: All offerors must have proposal responses signed by an authorized representative of your firm responding firm.

Proposals must be submitted to the e-mail address below by the closing date and time:

Wade.Holland@montgomerycountymd.gov

with the subject line "Proposal for Solicitation #1116560 CEX Strategic Plans Public Outreach."

Should you have questions regarding the specifications in this solicitation, please contact Wade Holland, Vision Zero Coordinator, at (240) 777-2623 or Wade.Holland@montgomerycountymd.gov.

Local Small Business Reserve Program (LSBRP) Notice

INFORMAL Solicitation # 1116560

CEX STRATEGIC PLANS PUBLIC OUTREACH

This solicitation is reserved for only **application submitted/certified** status local small businesses timely registered with the County's LSBRP. This solicitation thus comes under County Code, sections 11B-17A; 11B-65; 11B-70 and Executive Regulation 21-05AM. These documents can be accessed through the LSBRP web site at (www.montgomerycountymd.gov/LSBRP).

LSBRP criteria are based on a firm's location, ownership status, number of employees and annual revenue amount, submitting a bid/proposal constitutes willfully stating your firm is an **application submitted/certified** Local Small Business. Therefore, if you wish to submit a bid/proposal for this solicitation adhering to the LSBRP, you must:

1. Submit an application as a LSBRP firm prior to the bid's/proposals due date. If your LSBRP status is not **application submitted/certified** in our database prior to the bids/proposal's due date and time, then your bid will be deemed non-responsive and rejected or your proposal will be deemed unacceptable and removed from consideration. Go to the LSBRP web site (www.montgomerycountymd.gov/LSBRP) and follow the instructions under "Register."

2. After the informal solicitation closes and upon notification by the County, you must provide within three (3) business days the LSBRP documentation of:
 - all of its business location(s) (if more than one),
 - number of employees by location
 - annual gross revenue of the business for the past three fiscal years.(The preferred documents are copy of a lease, Maryland Unemployment Insurance Contribution Report (summary or quarterly), and Financial Statement/Tax Returns. At the discretion of the LSBRP, an alternative type of documents might be accepted.)

If, after receipt of these documents, the LSBRP finds that your firm does not meet the LSBRP requirements, then your bid will be deemed non-responsive and rejected or your proposal will be deemed unacceptable and removed from further consideration. For questions, contact the LSBRP (240-777-9913).

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I. SCOPE OF SERVICES

I.1. BACKGROUND

The Office of the County Executive (CEX) is working on two major strategic plans that will have profound impacts on the County as it seeks to achieve zero greenhouse gas emissions by 2035 and eliminate traffic-related fatalities and serious injuries by 2030. Due to the large scope and ambitions of each plan, it is critical to hear from communities that are traditionally underrepresented in the government planning process and may be unintentionally burdened by these plans if their voices are not heard.

The first strategic plan, the Climate Action and Resilience Plan (CARP), will be a roadmap to achieve zero greenhouse gas emissions in Montgomery County by 2035. An initial draft of the plan, created by workgroups consisting of county staff and community members, was released in February 2020 with over 850 recommendations. More about the climate planning process to date and the workgroups recommendations can be found at <https://www.montgomerycountymd.gov/green/climate/index.html>.

The second strategic plan seeks to eliminate traffic related deaths and serious injuries in Montgomery County by 2030 and is called the "Vision Zero" plan. Montgomery County adopted Vision Zero via a County Council resolution in 2016 and the County Executive has sponsored two action plans, the 2018-19 Two-Year Action Plan and the 2020 Action Plan, to implement Vision Zero. Both of the County Executive's Action Plans called for the creation of a long-term Vision Zero strategy that would guide County Government towards the elimination of serious and fatal collisions for pedestrians, cyclists, and motor vehicle occupants by the year 2030. Work on the long-term strategy is scheduled to begin in June 2020. The Vision Zero Coordinator has set Phase I of constructing the 10-Year Plan to focus on outreach and community engagement prior to Phase II where workgroups of government subject matter experts develop specific strategies. More about Vision Zero and the County's prior Action Plans can be found at <https://montgomerycountymd.gov/visionzero/action.html>.

The creation of both strategic plans have to-date not thoroughly engaged diverse community stakeholders as desired by leads of both strategic plans and are seeking assistance from a qualified contractor to assist the Office of the County Executive (CEX) in facilitation and engagement to traditionally underrepresented demographic groups and neighborhoods to ensure the strategic plans are representative of our diverse community. Traditionally underrepresented groups in Montgomery County include, but are not limited to, limited English speaking households, Hispanic-Americans, African-Americans, Asian-Americans, people with physical and cognitive disabilities, residents making less than 50% of the area median income, and residents under the age of 35.

I.2. PURPOSE AND INTENT

The purpose of this solicitation is to solicit proposals for facilitating, engaging, and building long-lasting connections with traditionally underrepresented demographic groups and neighborhoods to ensure the Climate Action and Resilience Plan and Vision Zero 10-Year Strategy are truly representative of the needs of our diverse community.

The County is seeking to enter into a contract with one (1) highly qualified Offeror to support CEX as described in the Scope of Services below. Due to the on-going public health emergency, it is the intent of the County to keep County employees and Contractors safe and will work with the Contractor to establish virtual meetings as described in the Contractor's responsibilities and County's responsibilities below.

I.3. SCOPE OF SERVICES/SPECIFICATIONS/WORK STATEMENT

- I.3.1. **Project Management** – This project will be conducted in close coordination with the Vision Zero Coordinator and the Climate Change Coordinator within the Office of the County Executive and their existing steering committees. The Contractor will be responsible for the daily management of the project team and will assign a Project Lead that meets or exceeds the requirements listed under *Contractor Qualifications* listed below. At minimum, monthly progress updates will be provided by the Contractor to the Coordinators and identify tasks that have been accomplished, issues encountered, and how those issues are being resolved. The Contractor's project management will include quality assurance and quality control for all deliverables.
- I.3.2. **Recommend Engagement Methods for Traditionally Underrepresented Communities with Social Distancing Practices in Place** – As the first phase of the project, the Contractor will recommend to the Coordinators public engagement methods to successfully engage with traditionally underrepresented communities. Traditionally underrepresented groups in Montgomery County include, but are not limited to, limited English speaking households, Hispanic-Americans, African-Americans, Asian-Americans, people with physical and cognitive disabilities, residents making less than 50% of the area median income, and residents under the age of 35. To date, the County Executive's Office has done some background research and designed potential questions that the Contractor will consider and incorporate into their final recommendations. The recommendations should include options that are viable while social distancing practices are in place such as virtual meetings. The recommended engagement methods should be based on the Contractor's experience with prior successful engagement with underrepresented communities, industry leading practices, and build off the work that has been completed to-date by County staff. Work on this task starts when the Notice to Proceed is given to the Contractor and anticipated to be completed by June 30, 2020.
- I.3.3. **Support public engagement** – The Contractor will support the Vision Zero and Climate Change Coordinators in public engagement using the recommended strategies developed in the first phase of this scope of work. Some engagement events may occur prior to the full completion of the first phase in order to meet the overall project deadline. Public engagement would involve the Contractor joining County staff and potentially public workgroup members at virtual and in-person events, community meetings, focus groups, etc. to solicit feedback on the communities' attitudes towards climate change and traffic safety, their thoughts on how their communities are impacted currently, and what they hope these plans will bring to their neighborhoods in future. Outreach will include conversations and presentations completely performed in a non-English language such as, but not limited to, Spanish, Mandarin Chinese, and/or Amharic. Community outreach efforts will be completed by September 30, 2020.
- I.3.4. **Provide administrative support for public engagement** - The Contractor will provide resources that will help the County administer the public engagement and outreach sessions. Facilitation and administration roles do not have to be split among the Contractor's assigned staff. Administrative support includes, but is not limited to, drafting agendas, taking meeting notes, and publishing meeting notes and follow-up items.
- I.3.5. **Final reports from outreach efforts** – At the conclusion of public engagement and outreach, the Contractor will provide to the County a summary of all engagements and report the feedback received from the community to be incorporated in the Climate Action and Resilience Plan and the Vision Zero 10-Year Strategy.

I.4. CONTRACTOR'S QUALIFICATIONS

- Experienced firm and project team that has worked with diverse groups of stakeholders and traditionally underrepresented communities to engage in the strategic planning and decision-

making process. (Traditionally underrepresented groups in Montgomery County include, but are not limited to, limited English speaking households, Hispanic-Americans, African-Americans, Asian-Americans, people with physical and cognitive disabilities, residents making less than 50% of the area median income, and residents under the age of 35.) The Project Lead should have five (5) or more years of experience for this qualification.

- Ability for one (1) or more project team members to write and speak one (1) of the top non-English languages in Montgomery County: Spanish, Mandarin Chinese, and/or Amharic.
- Knowledge of climate change, adaptation, and resilience planning. If the combined project team has less than one (1) year of experience, the Contractor should demonstrate its understanding of the County's climate change planning efforts to-date.
- Knowledge of Vision Zero, Complete Streets, Safe Systems Principles, and/or other traffic safety programs. If the combined project team has less than one (1) year of experience, the Contractor should demonstrate its understanding of the County's traffic safety (Vision Zero) efforts to-date.
- Provides and can adhere to a project proposal with deliverables, timelines, milestones, and staffing plans that align with the timelines, budget, and expectations set in the Scope of Work above. The Project Lead should have five (5) or more years of experience for this qualification.
- While minimum qualification thresholds are set for the Project Lead, the Contractor should detail the experience and qualifications of its proposed team members.
- The Contractor must provide a list of at least three (3) professional references that can validate the Contractor's experience in providing services of similar scope and nature to the ones included in this solicitation. See Attachment B – References to provide your references along with your proposal.

I.5. CONTRACTOR'S RESPONSIBILITIES

The contractor must provide services to the County in accordance with the terms and conditions of the Contract. Services will be provided within the fully burdened hourly rate agreed to in the Contract that is inclusive of overhead, cost of benefits, profit, multipliers, travel, etc. Billable hours and work performed shall be documented and submitted to the County's Contract Administrator when submitting a request for payment.

- I.5.1. **Staffing** – The Contractor is responsible for providing the necessary staff to the County to fulfill the scope of services outlined above and recommended in the contractor's proposal. The staffing plan should provide sufficient team members to support robust public engagement and should include the language proficiencies of each staff member. The Contractor will notify the County in writing of any changes to staffing and the County reserves the right to reject substitute staffing if the substitute is deemed not eligible to provide the service as set in the Contract and/or does not have equal or better qualifications.
- I.5.2. **Meeting Materials** - If outreach events are held in-person, the Contractor will provide printed materials to facilitate engagement such as, but not limited to, butcher paper, sticky notes, or printed activities. Materials to be provided by the County are listed in Section I.6 below. If in-person, Contractor must also adhere to the County's COVID-19 operational requirements, including social distancing, etc.
- I.5.3. **Virtual Meeting Requirements** – Community engagement may be performed virtually, in-person, or hybrid virtual/in-person sessions. The Contractor must ensure its staff have the technology and internet bandwidth to live-stream video from their computer, view live video from meeting participants, and share documents, presentations, and collaboration space (such as a virtual white board) with the participants in real-time. The County will provide a platform (Microsoft Teams) for meeting virtually, but the Contractor may substitute its own virtual meeting platform at its own

expense if the Contractor's platform meets the needs of the engagement event and is approved for use by the County Government's Department of Technology Services.

I.6. COUNTY'S RESPONSIBILITIES

- I.6.1. Provide regular guidance to the Contractor through, at minimum, monthly in person or virtual meetings and e-mail. Guidance will be given from the Vision Zero Coordinator and the Climate Change Coordinator.
- I.6.2. Provide access to County staff, contractors, interns, and volunteers that will also be supporting the Office of the County Executive in developing the strategic plans.
- I.6.3. Schedule the date, time, and location of meetings that the Contractor will be supporting. In order to meet with a wide variety of groups, meetings could be held anywhere within the county's borders if in-person, virtually, and between the hours of 8:00AM to 11PM.
- I.6.4. If meetings are held in-person, the County will provide meeting rooms to accommodate the discussions. The rooms will include computers connected to the internet and a projector or screen to share content in the room and with virtual participants, white boards, and tables and chairs.
- I.6.5. The County Government subscribes to the Microsoft Teams virtual meeting platform that allows for sharing video, audio, and meeting materials (such as slide deck presentations) in real-time. The County will create and set-up the virtual meetings. The County's virtual meeting solution will not require the Contractor to procure licensing or access the County's network to join the meeting. If there are issues with virtual meetings, the County will provide a conference call option for all meeting participants and Contractor's team.

I.7. REPORTS/DELIVERABLES

- Monthly status reports to the Vision Zero and Climate Change Coordinators.
- Meeting notes and summaries for all engagements and meetings held.
- Final report containing a summary of all meetings and an overall summary of the feedback received from the community to be incorporated in the Climate Action and Resilience Plan and the Vision Zero 10-Year Strategy.

II. EVALUATION CRITERIA AND AWARD METHOD

- Each proposal will be reviewed and evaluated based on the **EVALUATION CRITERIA** listed below.
- The Contract will be awarded to the highest ranked Offeror that achieves a score of at least 60 out of 100 points, based on the scores of the written proposal evaluation. An Offeror will also be checked for responsibility.
- At its sole discretion, the County reserves the right to cancel this solicitation, to extend the time for all Offerors to request additional information in the County's best interests, in any manner necessary, to serve the best interest of county.

EVALUATION CRITERIA

POINTS

The County will evaluate the written proposals based on the following criteria.

1. Describe prior experience working with diverse groups of stakeholders and traditionally underrepresented communities to engage in the strategic planning and decision-making process.	50
2. Describe ability to provide staff that speak a non-English language such as Spanish, Mandarin, and/or Amharic.	20
3. Describe knowledge of climate change, adaptation, and resilience planning.	5
4. Describe knowledge of Vision Zero, Complete Streets, Safe Systems Principles, and/or other traffic safety programs.	5
5. Submitted project proposal provides project management deliverables, milestones, and staffing plan that align with the timelines and resource expectations set in the scope of work.	5
6. Cost (minimum of 10% of Highest Possible Score)	15
Highest possible score for written proposal evaluation:	100

III. SUBMISSION REQUIREMENTS

Proposals are due by or before **6:00PM on Friday, May 29, 2020. FAILURE OF AN OFFEROR TO SUBMIT ALL REQUIRED PROPOSAL SUBMISSIONS MAY RENDER ITS PROPOSAL UNACCEPTABLE.**

III.1. Offeror's must submit their proposals in an electronic format (.pdf document format preferred) to:

Wade Holland, Vision Zero Coordinator
Wade.Holland@MontgomeryCountyMD.gov

III.2. The subject line of the e-mail with the attached proposal should state: "Proposal for Solicitation #1116560 CEX Strategic Plans Public Outreach"

III.3. Proposals must include, at minimum, the following sections:

III.3.1. A one-page cover letter of introduction which includes the following:

- III.3.1.1. The date of the proposal submission;
- III.3.1.2. Name and address of the organization (Offeror);
- III.3.1.3. Contact person, phone number, and e-mail address

III.3.2. Offeror will detail its experience working with diverse groups of stakeholders and traditionally underrepresented communities to engage in the strategic planning and decision-making process.

III.3.3. Offeror will detail the ability of its staff proposed to work on this Contract to speak and write a non-English language such as Spanish, Mandarin Chinese, and/or Amharic.

III.3.4. The Offeror will detail its knowledge of climate change, adaptation, and resilience planning.

III.3.5. The Offeror will detail its knowledge of Vision Zero, Complete Streets, Safe Systems Principles, and/or other traffic safety programs.

III.3.6. The Offeror will provide a draft project proposal with deliverables, timelines, milestones, and staffing plans that align with the timelines, budget, and expectations set in the Scope of Work above.

III.3.7. Acknowledgement Page, Attachment A

III.3.8. References, Attachment B

III.3.9. Cost Proposal Sheet, Attachment C

IV. COMPENSATION

IV.1. TOTAL CONTRACT VALUE

The total contract value cannot exceed the Informal threshold (below \$100,000), including any potential renewal years. Payment will be based on the negotiated fully-burdened hourly rate approved under the resulting contract.

The County anticipates the estimated value to be above ten thousand dollars (\$10,000) and below twenty thousand dollars (\$20,000).

IV.2. TOTAL CONTRACT VALUE

The Contractor will be paid on a monthly basis, within 30 days after the County's receipt and acceptance of an invoice submitted by the contractor and in a form approved by the County. The monthly invoice will include progress updates and identify tasks that have been accomplished, issues encountered, and how those issues are being resolved.

V. TERM

The effective date of the Contract resulting from this solicitation will begin upon signature by the Director, Office of Procurement. The period in which Contractor must perform all work under the Contract begins on the Contract effective date (or upon a Notice to Proceed issued by the County) and ends after a one-year period. Contractor must also perform all work in accordance with time periods stated in the Scope of Services. Before this term for performance ends, the Director at this/her sole option may (but is not required to) renew the term. Contractor's satisfactory performance does not guarantee a renewal of the term. The Director may exercise his/her option to renew this term, for one term of one year.

VI. CONTRACT ADMINISTRATOR

VI.1. AUTHORITY

The Director, Office of Procurement, is the delegated contracting officer. Therefore, the Director, Office of Procurement, must approve amendments, modifications, or changes to the terms, conditions, or minority, female, and disabled subcontractor plans in writing.

VI.2. USING DEPARTMENT

The contract administrator's duties are defined in the General Conditions of Contract between County and Contractor, Section J, item #6A.

VI.3. CONTRACT ADMINISTRATOR

The Contract Administrator for any contract resulting from this solicitation is Wade Holland, Office of the County Executive, 101 Monroe St, 2nd Floor, Rockville, MD 20850, 240-777-2623, wade.holland@montgomerycountymd.gov.

VII. ETHICS

As a result of being awarded a contract resulting from this solicitation, the successful contractor may be ineligible for the award of related contracts. In this regard, Montgomery County Code Sections 11B-52 (b) and (c) state the following:

A contractor providing an analysis or recommendation to the County concerning a particular matter must not, without first obtaining the written consent of the Chief Administrative Officer:

- (a) Assist another party in the matter or another person if the person has a direct and substantial interest in the matter; or

- (b) Seek or obtain an economic benefit from the matter in addition to payment to the contractor by the County.

VIII. MONTGGOMERY COUNTY CODE AND PROCUREMENT REGULATIONS

The Montgomery County Code and Montgomery County Procurement Regulations are applicable to this solicitation and any contract awarded pursuant to this solicitation. Additionally, the County's General Terms and Conditions (Section IX) will be incorporated into the contract resulting from this Informal solicitation

IX. GENERAL CONDITIONS OF CONTRACT BETWEEN COUNTY AND CONTRACTOR

(see link below)

<https://www.montgomerycountymd.gov/PRO/Resources/Files/SolForm/PMMD-45.pdf>

ATTACHMENT A - ACKNOWLEDGMENT PAGE

1) ACKNOWLEDGMENT

The offeror must include a signed acknowledgment that all the provisions, terms and conditions of this solicitation are agreeable to the offeror and may, at the County's option, be made applicable in any contract issued as a result of this solicitation. Offers that do not include such an acknowledgment may be rejected. Executing and returning (with the offer) the acknowledgment shown below will satisfy this requirement.

The undersigned agrees that all the provisions, terms and conditions of this solicitation may, at the County's option, be made applicable in any contract issued as a result of this solicitation.

Business Firm's Legal Name
(printed):

Printed Name and Title of
Person Authorized to Sign
Proposal:

Signature:

Date:

2) NAME AND SIGNATURE REQUIREMENTS FOR PROPOSALS AND CONTRACTS

The correct and full legal business name of the offeror must be used in proposals received and on all contracts issued as a result of this solicitation. A trade name (i.e., a shortened or different name under which the firm does business) must not be used when the legal name is different. Corporations must have names that comply with State law, which requires a suffix indicating the corporate status of the business (e.g. Inc., Incorporated, etc.). Trade names may be indicated by individuals or corporations with the individual or corporate name followed by "t/a" (trading as) or "d/b/a" (doing business as), respectively. The offeror's signature on the proposal, contract, amendment(s) or related correspondence, must conform to the following:

All signatures must be made by an authorized officer, partner, manager, member, or employee. The signing of this offer or a contract is a representation by the person signing that the person signing is authorized to do so on behalf of the offeror or contractor.

ATTACHMENT B - REFERENCES

(submit at least three)

You are requested to provide references to the County with your proposal. The three (3) references must be from individuals or firms for whom work of a similar scope has been performed within the last three years. Names for references shall be of individuals who directly supervised or had direct knowledge of the services or goods provided.

NAME OF FIRM: _____
ADDRESS: _____
CITY: _____ STATE: _____ ZIP: _____
CONTACT PERSON: _____ PHONE: _____
EMAIL: _____ CELL PH _____

NAME OF FIRM: _____
ADDRESS: _____
CITY: _____ STATE: _____ ZIP: _____
CONTACT PERSON: _____ PHONE: _____
EMAIL: _____ CELL PH _____

NAME OF FIRM: _____
ADDRESS: _____
CITY: _____ STATE: _____ ZIP: _____
CONTACT PERSON: _____ PHONE: _____
EMAIL: _____ CELL PH _____

ATTACHMENT C - FEE SCHEDULE

The Offeror must provide fully burdened hourly rate, which must include all cost for overhead, cost of benefits, profits, etc. for the following services outlined below. The following job titles are illustrative of the expected roles performed by the Contractor, but the Offeror can submit alternative job titles as long as the alternative job titles can provide the services described in the Scope of Services:

LABOR CATEGORY	FULLY BURDENED HOURLY RATE
Project Lead / Manager	
Community Outreach Facilitator – English Speaking Only	
Community Outreach Facilitator - Multilingual	

Other key staff (Please list)*

LABOR CATEGORY	FULLY BURDENED HOURLY RATE

*List labor category, job description, and fully burdened rate. (E.g. “Senior engineer, 7+ years experience in traffic and transportation research, analysis, planning and design, \$X/hour.”)

Materials Cost

CATEGORY	FULLY BURDENED COST PER PUBLIC ENGAGEMENT EVENT
Printing and providing meeting materials and brainstorming tools as listed under Contractor’s Responsibility	\$__ per public engagement event